

PREFATORY NOTE

The reader should bear in mind the following points, all of which have served as planning assumptions or conditions.

1. This proposed Leadership Conference is in response to the Executive Director-Comptroller's desire that a "short review for some of our most senior officers" be designed for presentation to individual components of the Agency.
2. The Conference is designed to be conducted at an out-of-town site over two consecutive days and the intervening evening.
3. It is preferable by far to involve the participants actively rather than to encourage them to be passive listeners primarily.
4. All Conference sessions will be handled by OTR officers assigned to the Management Training Faculty.
5. The number of participants should be kept low so as to improve the likelihood of useful interchange of opinions and of practical results. We recommend 12 - 18 persons with 15 as our preferred number.
6. The first day and evening of the Conference are applicable to the general interests of any Agency component. The second day, and particularly the afternoon thereof, is designed to accommodate the specific interests of the component for which the Conference is conducted. Guidance concerning such interests results from interviews with the head of the component.

LEADERSHIP CONFERENCE

Office of Training

14 - 15 December 1972

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OBJECTIVES

- I. To reinforce each participant's understanding of the Leadership role so that he can be more effective in performing his Leadership functions.
- II. To improve the potential for Leadership in a component by developing the abilities of subordinates to meet future needs.
- III. To produce a composite profile of Leadership traits, behavior, work experience, and educational credentials that may be used as criteria for identifying Leadership potential.

LEADERSHIP CONFERENCE
Schedule

THURSDAY

0900 - 0915	Administration and Introduction to the Conference
0915 - 0945	<u>Presentation:</u> Leadership: Definitions-Theory-Practice
0945 - 1045	Group Exercise: "Supervisory Practices Survey"
1045 - 1100	Break
1100 - 1130	<u>Group Exchange:</u> "Supervisory Practices"; comparison with "findings" from "Survey" previously administered to other management courses
1130 - 1200	<u>Presentation:</u> The technician (T) and management (M) functions of the leader and applications in the leadership role in OTR
1200 - 1300	Lunch
1300 - 1345	<u>Presentation/Discussion:</u> Leadership Styles
1345 - 1430	<u>Presentation/Conference Activity:</u> Leadership Values
1430 - 1455	Break
1455 - 1515	<u>Presentation:</u> Maslow's "Hierarchy of Human Needs"-- Motivation
1515 - 1600	<u>Discussion:</u> "Work Motivation Inventory", comparison of "findings" with data gathered from previous administration of the "Inventory" in other management courses
1600 - 1615	Exercise: "Factors Which Motivate Me"

THURSDAY EVENING

1900 - 1910	Introduction to the film: "Patterns"
1910 - 2000	Film: "Patterns"
2000 - 2030	Discussion of Film (relating it to previous instruction)
2030 - 2045	Break
2045 -	Discussion of assigned readings in Cribbin's book: "Effective Managerial Leadership"

FRIDAY

0900 - 0920	<u>Instructor Remarks:</u> OTR Leadership in the Future
0920 - 0945	<u>Instructor/Conference:</u> Exchange of descriptive words and phrases--OTR leadership needs for the future
0945 - 1045	<u>Group Exercise:</u> Prepare a composite profile on the ideal leader-manager for future OTR needs
1045 - 1100	Break
1100 - 1200	<u>Group Exchange/Discussion:</u> Composite profiles--time permitting, a single composite profile on the ideal leader-manager for future OTR needs
1200 - 1300	Lunch
1300 - 1500	<u>Group Exercise:</u> Current Problems for the Leader-Manager in OTR. Each group will select two topics from these four: <u>Organization</u> ; <u>Personnel Development</u> ; <u>Identification and Evaluation of Production</u> ; and <u>Delegation</u> . (Topic sheets will be provided.) --Break is included--
1500 - 1600	<u>Group Exchange/Discussion:</u> Newsprint presentations on "Topics"
1600 -	<u>Summary Remarks</u> and <u>Course Critique</u> (oral a/o written)

- Departure -

LEADERSHIP CONFERENCE
Lesson Plan

TITLE: Lecture: Leadership: Definitions - Theory - Practice

Time: 1/2 hour

OBJECTIVE

1. To suggest "working" definitions of basic terms.
2. To review the results of research on the subject of "Leaders".
3. To focus attention upon the practices which the Agency considers vital to "Promoting Good Employee Performance and Conduct".

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and EQUIPMENT

1. Blackboard, eraser, and chalk (white, red, blue, yellow).
2. Newsprint easel; newsprint pad; felt markers (black, red, green, blue).
3. Handouts:
 - a. Excerpt from "Principles and Problems of Naval Leadership" (NAVPERS 15924-1959).
 - b. Excerpt from "Military Leadership" (Army Field Manual 22-100, December 1958).
 - c. "Two Dozen Ideas for Effective Administration" (adapted from Management Aids for Small Business, Annual No. 1, 1955).
 - d. "The Management Process in 3-D" by R. Alec Mackenzie (Harvard Business Review, November-December 1969).

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4. Agency Headquarters Handbook [REDACTED]
"Promoting Good Employee Performance and Conduct", 15 April 1962.
5. Forms, "16 P.F. Test Profile" with results re "Bosses" from Office Management Seminar.
6. Pre-conference results of "Supervisory Practices Survey" given to participants.
7. Results of "Supervisory Practices Survey" administered to students in Managerial Grids and Fundamentals of Supervision and Management Courses.

INTRODUCTION

1. Describe the objectives of this session (Newsprint).
2. State the assumptions underlying the presentation:
 - a. Participants already are aware of most, if not all, of the main points, hence this is primarily a review.
 - b. It is unlikely that all participants agree on the meanings of basic terms, hence some effort is needed to prevent total semantic chaos during the conference.
 - c. As leaders, participants are guided by individual convictions which may or may not be congruent with official Agency "Doctrine".

PRESENTATION

1. Definitions and Perspectives
 - a. Leader/Leadership
 - b. Manager/Management
 - c. The Leader-Manager
 - d. Principles of Leadership
2. Highlights of research on the subject of "Leaders"
 - a. Trait theory
 - b. Behavior theory
 - c. Situational theory
3. A look at Headquarters Handbook 25X1A
 - a. Results of survey administered to Grids and FSM courses
 - b. Results of survey of conference participants

SUMMARY

1. Leadership remains one of the least understood aspects of the practice of management. (Filley & House, p. 416)
2. It is wise to think of managerial leadership in terms of the interaction of several variables. (Cribbin, p. 31)
3. Research has provided certain guidelines for the leader-manager (Cribbin, pp. 46-48)

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4. Taking IHHB [REDACTED] as the statement of the Agency's official position, the Agency is on firm ground insofar as guidelines are concerned.
5. This leaves us with the problem of choosing the most effective leadership behavior to achieve desired goals in prescribed situations.

LEADERSHIP CONFERENCE
Lesson Plan

TITLE: Group Exercise: Supervisory Practices Survey

Time: 1 3/4 hours

OBJECTIVE

1. To identify the item(s) in HHB [REDACTED] in need of priority attention in OTR. 25X1A
2. To determine at least the initial steps to be taken in order to deal effectively with the situation(s) identified under Objective 1.

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and EQUIPMENT

1. Blackboard, chalk, eraser, newsprint pads and easels, and felt markers for each of three discussion rooms.
2. Participants' copies of the "Supervisory Practices Survey".

INTRODUCTION

1. Describe the objectives of the exercise.
2. Identify the assumptions underlying the exercise:
25X1A
 - a. Using HHB [REDACTED] as a guide, participants can arrive at consensus, if not unanimous agreement, on at least one significant shortcoming within OTR.
 - b. Participants will consider the identified shortcoming serious enough to warrant concerted effort to overcome it.
 - c. Participants will recognize that this exercise is but a first, small step in the direction of improving the performance of leader-managers in OTR, and that achievement of the desired goal will require continued, on-the-job attention.

PRESENTATION

1. Organization for the exercise.
 - a. Divide the participants into three groups.
 - b. Assign each group to a discussion room.
 - c. Time available for discussion: 1 hour.
 - d. Inform groups that each will have to appoint a spokesman to make the group's presentation in General Session.
2. Assignment to the groups.
 - a. Select the one item from the list in [REDACTED] which you believe requires priority attention in OTR.
 - b. Explain how to select from among items considered of equal importance.
 - c. For the selected item develop, to the extent possible within the time available, the steps to be taken to deal effectively with that item.
 - d. Put results on newsprint for presentation in General Session.

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GENERAL SESSION

1. Have each group report its findings.
2. Encourage discussion of results, especially those that are identical, in terms of post-conference follow-through.

TITLE : Lecture: Technician (T) and Management (M) Functions of the Leader Time: 30 minutes

OBJECTIVE : To remind participants of their technical and managerial functions employing "T" and "M" concepts so that they may become more conscious of their daily activities in these terms.

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EQUIPMENT : Blackboard and chalk or newsprint easel and felt markers.

INTRODUCTION

1. Describe the objective of the lecture.
2. The concept is simple and basic enough to allow the participants to think, immediately, in terms of each's functions on his job.

PRESENTATION

1. Definition of "T" and "M"
 - a. All work can be described with these letters.
 - b. Examples (President to kitchen boy).
2. Career progress and relationship to "T" and "M"
 - a. Doctor
 - b. Businessman
 - c. Carpenter
 - d. Artist
3. Training Careerist
 - a. Toward leader-manager role.
 - b. Toward senior instructor status.

- * Handout Office of Training Executive Activity List - allow each participant to identify each statement as "T" or "M", using results to emphasize sometime difficulty in distinguishing between functions.

SUMMARY : 1. Emphasize need to be aware of which function you are performing at any given time and how the functions should be balanced in one's job as a leader-manager.

- * Refer to seven statements and questions (if time permits) on OTR "T" and "M" functions as added emphasis on lecture and something to think about for the future.

TITLE: Presentation: Leadership Styles Time: 45 minutes

- OBJECTIVES :
1. To improve participant understanding of Leadership styles in order that they may examine their own style(s) as leader-managers and identify styles of others.
 2. To assure that participants understand there is no single preferred style of leadership nor does any person employ one style exclusively.

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EQUIPMENT

- :
1. Blackboard and chalk or newsprint easel and felt markers
 2. Handout materials:
 - a. Managerial Grid (single page summary)
 - b. Leadership Styles, Prince, HBR
 - c. Summary of Styles, Cornell University
 - d. Reddin's Management Style Diagnosis
 - e. Bassett's Polarity of Managerial Temperament

INTRODUCTION : 1. Describe objectives of the presentation

- PRESENTATION :
1. Definition(s) of Style
 2. Current history of pigeonholing leaders as:
 - a. Democratic
 - b. Autocratic
 - c. Laissez-Faire

3. Anthony Downs' Descriptions of Bureaucratic Leaders.
4. Dale's Adaptation of Eric Fromm's descriptions to fit the leader-manager.
5. Cornell University's Business School Listing

* Distribute copies to the participants.

6. Bassett's Polarities of Managerial Temperament

* Distribute copies to the participants

7. Blake and Mouton and the Managerial Grid

* Distribute one-page summaries to the participants.

8. Reddin's 3-D Grid: Management Style
Diagnosis Test

* Distribute copies to the participants

SUMMARY

1. Emphasize the need:

- a. To better understand your own Style(s) and recognize the Style(s) of others.
- b. To understand that there is no ideal Style of leadership. To understand that all leader-managers employ various Style combinations, preferring and employing one more than the others.

* Distribute copies to the participants of Leadership Styles, Prince, HBR

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Lesson Plan

TITLE: Presentation: Leadership Values

Time: 45 minutes

OBJECTIVE : To discuss the leader-managers' personal values so that the participants can understand that personal values are reflected in their work and that of their superiors, peers, and subordinates.

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EQUIPMENT

1. Blackboard and chalk or newsprint easel and felt markers.
2. Handouts: a. Study of Values, Allport-Vernon-Lindzey
b. Cornell University's Life Values or Goals Exercise
c. The Puritan Ethic, Tawney and Weber

INTRODUCTION : State objective of the presentation.

PRESENTATION : 1. Definition

2. The value system of the leader-manager concerning:
 - a. Himself
 - b. His family
 - c. His work (The Puritan Ethic)
 - d. His associates
 - e. His subordinates
 - f. His superiors
 - g. Society

- Today's changing values
- a. Toward work
 - b. Toward women
 - c. Toward minority groups
 - d. Toward youth
 - e. Toward religion
4. Study of Values, Allport-Vernon-Lindzey
- a. Theoretical
 - b. Economic
 - c. Aesthetic
 - d. Social
 - e. Political
 - f. Religious
5. Can a leader-manager change his value system?
- a. Toward people
 - b. Toward his work
 - c. Toward society

Summary: All that we could accomplish in this brief time was to direct your attention to the subject of values and the leader-manager's value system. How it effects your work and others' work is for you to judge.

- * Distribute the following papers:
- a. Study of Values, Allport, Vernon and Lindzey
 - b. Cornell University's Life Values or Goals Exercise.
 - c. The Puritan Ethic, Tawney and Weber

TITLE: LECTURE: Abraham Maslow's "Hierarchy of Needs" Time: 30 minutes

- OBJECTIVE: 1. Participant should be able to relate "hierarchy" concept to the subject of motivation.
2. Additionally, to relate the concept to his leader-manager role in the Agency.

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EQUIPMENT: Blackboard and chalk; handout on "hierarchy".

INTRODUCTION

1. Explain the purpose of the lesson.
 - a. To review the "hierarchy" and how it relates to the subject of motivation.
 - b. To show how the "hierarchy" can be used in understanding human motivation.

PRESENTATION

1. Human Needs (Motivation)
 - a. Commonality (examples).
 - b. Work/Play/Avocational interests (examples).
 - c. Identification in self in order to understand and appreciate it in others--critical to leader-manager role.
2. Description of Maslow's Hierarchy
 - a. Physiological (motivation)
 - b. Safety "
 - c. Social "
 - d. Ego "
 - e. Self-actualization "

3. Relationship to Work.

a.

b.

c.

SUMMARY Assure through class examples that concept is understood.

* Handout copies of the Hierarchy and the Grid overlay.

TITLE : Exercise: Tomorrow's Leaders Time: 2 1/2 hours

OBJECTIVE : Each group will prepare composite profiles on the ideal leader-manager for future OTR needs.

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EQUIPMENT : Blackboard, chalk; flip charts, felt markers; and discussion guide.

INTRODUCTION 1. Explain the purpose of exercise.

- a. To exploit class experience and ideas on OTR leader-manager needs.
- b. To record composite profile based on class experience and ideas.

PRESENTATION 1. Ask class to contribute descriptive words and phrases in describing the type of person the future OTR leader-manager should be.

* List class contributions on the blackboard.

2. Direct groups to develop what they believe is a composite profile of an ideal OTR leader-manager.

* Groups to go to respective group rooms and with the use of a flip chart develop "composites".

3. Upon return to classroom groups will exchange "findings", answer questions and compare findings for a class composite.
4. Time permitting, a single composite profile may may be constructed.

SUMMARY

1. This exercise was to make us think more concretely about our successors.
2. The profile(s) may prove a helpful referent for all of us.

LEADERSHIP CONFERENCE
Lesson Plan

TITLE : Exercise: Current Problems Time: 3 hours
for the Leader-Manager in OTR .

- OBJECTIVES :
1. To provide information gleaned from the writings of management experts on four topics related to the management process (Organization; Personnel Development; Identification and Evaluation of Production; and Delegation) from which the participants may select two related to current practices in OTR.
 2. To enable the participants, meeting in groups, to isolate problems related to these "current practices" in OTR.

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- EQUIPMENT :
1. Three group rooms with newsprint easels and felt markers.
 2. Handouts: Topic Sheets:
 - a. Topic #1: Organization
 - b. Topic #2: Personnel Development
 - c. Topic #3: Identification and Evaluation of Production
 - d. Topic #4: Delegation

INTRODUCTION

Explain the objectives of the exercise.

PRESENTATION

1. Pass out copies of Topic Sheets #1-#4 to each participant with instructions that all four Topic Sheets be read at this time.

* Allow sufficient time for participants to complete readings.

2. Pass out Instruction Sheet and read it together with participants.
 - A. As a group select two Topics related to current practices in OTR which you would like to work on.
 - B. Compare the information contained in the Topic Sheet with OTR current practices in order to isolate -- what you consider to be -- problems in OTR.
 - C. Specify what your group proposes to do toward solving the problem(s) in OTR.
 - D. Record findings from "B" and "C" on newsprint for presentation to the other groups in general session.
3. Instruct participants to go to their group rooms and specify the time they are to return to the general session room.
4. Upon participants return to general sessions room, commence newsprint exchange.

SUMMARY

1. Was any Topic paramount in choice and presentation?
2. Was there consensus on a Topic or Topics among the three groups in their identification of the problem(s) and proposed solutions?
3. Are the findings of any use of OTR after the Conference is over?

* Preserve the newsprints for participant and training staff reference and have them typed for possible duplication.